

Sunday, February 12

7 a.m.
- 1
p.m.

Conference Session Recordings - order early and save!

Bring the conference home with you for training, reviewing sessions, or to share with those unable to attend. We offer the opportunity to purchase mp3 multimedia recordings that include audio recordings of conference sessions. Session PowerPoint and resource materials, an exhibitor/sponsor list, and important information about the Council are also included. In addition, resources will be available on the Web at the [Live Learning Center](#). Order conference recordings [here](#).

Pre-conference Orders – \$129

Onsite Orders – \$149

Post-conference Orders – \$299

Order early and save!

Meeting Room: TBD

10
a.m. -
5 p.m.

Off-site Learning Experience: Take a Walk on the Wild Side - The Everglades

Hear from experts about the preservation of Everglades National Park. Spend the morning hiking, have lunch, and enjoy a tram ride out to the Shark Valley area. You'll see a wide variety of flora, fauna, and wildlife—including alligators, turtles, and spoonbills.

Separate registration is required for this event and the cost is \$50 for members and \$100 for non-members. Space is limited. [Register now](#)

Session Designer(s): [Nancy Jones](#), Vice President, Public Affairs & Communications, The Miami Foundation; [Ms. Jillian C. Vukusich](#), Director of Community Investment, The Community Foundation for Palm Beach & Martin Counties

Meeting Room: OFF-SITE

2 p.m.
- 5
p.m.

CEO Retreat - Just for You: Qualities, Challenges and Opportunities of the Family Foundation CEO

Sponsored by Glenmede

Two-day Session

February 12 - 2pm to 5pm

February 13 - 8am to 3pm

Member Cost: \$339 /Non-Member: \$469

The role of the family foundation CEO is complex, inspiring, educational—and sometimes even maddening. Presented by the National Center for Family Philanthropy and based

on recent research, this two-day, CEO-only seminar will offer a safe, confidential environment to look at leadership in family systems, managing expectations, ensuring individual and foundation effectiveness, personal and family leadership, and life after the foundation. [Click here to view the agenda](#)

Presenter(s): [Virginia M. Esposito](#), President, National Center for Family Philanthropy; [Katherine Lorenz](#), President, Cynthia and George Mitchell Foundation; [Richard L. Moore](#), President, Weaver Foundation; [Kathleen Odne](#), Executive Director, Dean & Margaret Leshner Foundation; [Jeffrey R. Solomon](#), President, The Andrea and Charles Bronfman Philanthropies, Inc.; [Gayle Williams](#), Executive Director, Mary Reynolds Babcock Foundation

Moderator(s): [Thomas F. Beech](#), President Emeritus, Fetzer Institute

Session Designer(s): [Virginia M. Esposito](#), President, National Center for Family Philanthropy; [Karen Green](#), Vice President, National Center for Family Philanthropy

Meeting Room: TBD

5 p.m.
- 6:30
p.m.

CEO Reception

This reception is exclusively for registrants of the CEO Retreat.

Meeting Room: Conference Terrace, Third Level

6:30
p.m. -
9 p.m.

Sunday Night at the Movies - Dinner, Screening and Discussion

Tickets: \$50 for non-GFEM members/\$40 for GFEM members.

OFF AND RUNNING; a film by Nicole Opper and Sharese Bullock.

With white Jewish lesbians for parents and two adopted brothers—one mixed-race and one Korean-American—Avery grew up in a unique and loving household. But when her curiosity about her African-American roots grows, she decides to contact her birth mother. This choice propels Avery into her own complicated exploration of race, identity, and family that threatens to distance her from the parents she's always known. Meet Avery and filmmakers Nicole Opper and Sharese Bullock after the screening and participate in an in-depth discussion of the film and the issues it raises. The discussion will be moderated by Pam Harris, managing director of Grantmakers in Film + Electronic Media (GFEM). The screening is cosponsored by the Council on Foundations and GFEM.

Contact: Evelyn Gibson (evelyn.gibson@cof.org, or 703-879-0691) or sign up with your registration.

Tickets: \$50 for non-GFEM members/\$40 for GFEM members.

Session Designer(s): [Evelyn E. Gibson](#), Director, Awards Programs, Council on Foundations

Meeting Room: POINCIANA 3/4, Second Level

Monday, February 13

7 a.m.
- 5
p.m.

Conference Session Recordings - order early and save!

Bring the conference home with you for training, reviewing sessions, or to share with those unable to attend. We offer the opportunity to purchase mp3 multimedia recordings that include audio recordings of conference sessions. Session PowerPoint and resource materials, an exhibitor/sponsor list, and important information about the Council are also included. In addition, resources will be available on the Web at the [Live Learning Center](#). Order conference recordings [here](#).

Pre-conference Orders – \$129
Onsite Orders – \$149
Post-conference Orders – \$299

Order early and save!

Meeting Room: TBD

8 a.m.
- 3
p.m.

CEO Retreat - Just for You: Qualities, Challenges and Opportunities of the Family Foundation CEO: Day 2

Sponsored by Glenmede

Member Cost: \$339 /Non-Member: \$469

Day two of the CEO Retreat. Presented by the National Center for Family Philanthropy

Presenter(s): [Virginia M. Esposito](#), President, National Center for Family Philanthropy; [Katherine Lorenz](#), President, Cynthia and George Mitchell Foundation; [Richard L. Moore](#), President, Weaver Foundation; [Kathleen Odne](#), Executive Director, Dean & Margaret Leshner Foundation; [Jeffrey R. Solomon](#), President, The Andrea and Charles Bronfman Philanthropies, Inc.; [Gayle Williams](#), Executive Director, Mary Reynolds Babcock Foundation

Moderator(s): [Thomas F. Beech](#), President Emeritus, Fetzer Institute

Session Designer(s): [Virginia M. Esposito](#), President, National Center for Family Philanthropy; [Karen Green](#), Vice President, National Center for Family Philanthropy

Meeting Room: COWRIE, Third Level

10
a.m. -
3 p.m.

Best Practices For New Foundations

Member Cost: \$225 /Nonmember: \$375

Are you in the planning stages of starting a foundation or have you established one in the last two years? Learn about the many legal and practical issues--such as private foundation rules, fiduciary responsibility, and proper stewardship of resources--that arise in creating foundations.

Presenter(s): [Nina L. Cohen](#), Managing Director/Director of Philanthropic Advisory Services, Glenmede; [Andrew Schulz](#), Vice President, Legal and Government Relations, Council on Foundations; [Colburn S. Wilbur](#), Trustee and Past President, The David and Lucile Packard Foundation

Session Designer(s): [Andrew Schulz](#), Vice President, Legal and Government Relations, Council on Foundations; [Colburn S. Wilbur](#), Trustee and Past President, The David and Lucile Packard Foundation

Meeting Room: POINCIANA 3, Second Level

10
a.m. -
3 p.m.

Improving Communication and Managing Conflict – Principles and Practice

Member Cost: \$225 /Nonmember: \$375

In family foundations, wise giving and robust family involvement depend on effective communication and the ability to manage conflict and stress. This interactive, two-part session will explore interpersonal dynamics through self-assessment and hands-on experience. During part one we'll identify and describe different methods of communicating and how style, rather than substance, is often at the heart of family disputes. Part two is devoted to agreement-making practice in groups, with tools you can use immediately in your family discussions. Designed for foundation trustees, this session is guaranteed to be both enlightening and fun.

Presenter(s): [Brent Toleman](#), Senior Consultant, Strategies, Inc.

Session Designer(s): [Ericka Plater Turner](#), Managing Director, Professional Development, Council on Foundations; [Brent Toleman](#), Senior Consultant, Strategies, Inc.

Meeting Room: POINCIANA 2, Second Level

10
a.m. -
3 p.m.

Next Generation Retreat

Member Cost: \$225 /Nonmember: \$375

Leadership development is critical as Next Gen-ers step into roles as trustees and professional staff for their family philanthropies. Whether you're new to the field or have

years of experience, this preconference session will help you become a more effective and collaborative leader during interactive exercises to: (1) assess when and how to exercise your leadership capacities, (2) discover what will work successfully in your family landscape, and (3) identify areas of leadership you want to strengthen. In addition, you will clarify your philanthropic identity and the role you want to play in your family's charitable efforts.

Presenter(s): [Sharna Goldseker](#), Vice President, 21/64, The Andrea and Charles Bronfman Philanthropies, Inc. ; [Jaimie Mayer Phinney](#), Trustee, The Nathan Cummings Foundation; [Jessie Spector](#), Program Director, Resource Generation

Session Designer(s): [Sharna Goldseker](#), Vice President, 21/64, The Andrea and Charles Bronfman Philanthropies, Inc. ; [Barbara Taylor](#), Program Associate, 21/64, The Andrea and Charles Bronfman Foundation, Inc.

Meeting Room: POINCIANA 1, Second Level

10
a.m. -
12
p.m.

SITE SESSION: Art Deco Walk

Cost (due in cash at the beginning of the tour): \$25 per person

Miami Beach's renowned Art Deco District was listed on the National Register of Historic Places in 1979. Learn how Barbara Baer Capitman, who has been called the district's creator, won the fight to protect these 1930s treasures against deep-pocket developers with political ties. This walking tour includes many stops, so wear comfortable walking shoes, a hat, plenty of sunscreen—and don't forget the bottled water. Families with kids and strollers are welcome.

This tour is being organized and conducted by Alexandra Bassil, a local tour guide.

Session Designer(s): [Alexandra Bassil](#), Certified Heritage Tourism Guide

Meeting Room: OFF-SITE

2 p.m.
- 3:30
p.m.

The Nuts and Bolts of Government Relations: How to Keep the Wheels Turning

This special training session will explore the essentials of public policy and advocacy engagement. It is designed for family foundation members who need the right tools to play in the political sandbox at both the federal and local levels.

Presenter(s): [Chatrane Birbal](#), Director, Government Relations, Council on Foundations; [Hal McCabe](#), Director of Field Operations, Council on Foundations; [Shelton R. Roulhac](#), Senior Policy Director, Council on Foundations; [Andrew Schulz](#), Vice President, Legal and Government Relations, Council on Foundations

Session Designer(s): [Chatrane Birbal](#), Director, Government Relations, Council on Foundations; [Andrew Schulz](#), Vice President, Legal and Government Relations, Council on Foundations

Meeting Room: SANDS/NEW YORKER, Second Level

2 p.m.
- 3
p.m.

Tools of Engagement: Family Dynamics and Social Networking

Social networking is a critical piece of an integrated communications strategy for family foundations and an excellent platform to engage Next Gen-ers. This preconference session features the latest data and demographics from the top social networks, provides basic techniques to establish and maximize your social media presence, and offers case studies from the Council and its members. You'll also receive detailed information on how blogs, Facebook, LinkedIn, YouTube, and Twitter all work together, and learn about the financial and staff resources required for using them all.

Presenter(s): [Mark Carpenter](#), Manager, Public Relations, Council on Foundations; [Sam Stern](#), CEO/Chief Brandtrepreneur, CAP Brand Marketing

Session Designer(s): [Mark Carpenter](#), Manager, Public Relations, Council on Foundations; [Ashley Mills](#), Director of Public Relations, Council on Foundations

Meeting Room: POINCIANA 4, Second Level

3 p.m.
- 3:30
p.m.

Family Central Break

Meeting Room: Americana Salon 4, Second Level

3:30
p.m. -
4 p.m.

Family Tree Reception

Participating in a family tree gives lets you connect with like-minded attendees at several points throughout the conference. This reception is the perfect opportunity to discuss your philanthropic work and what you are learning—while also offering plenty of time to relax and reflect with the other members of your family tree. If you haven't signed up to be part of a family tree, [click here for more details](#).

Meeting Room: Americana Salon 4, Second Level

4 p.m.
- 5
p.m.

Welcome Reception

One word says it all, WELCOME! Kick off your three-day learning experience at the Family Philanthropy Conference Welcome Reception. Take some time to enjoy refreshments and reminisce with colleagues you met at a previous conference or get acquainted with new friends. You'll hear from Council staff and learn a bit more about what's in store over the next few days.

Meeting Room: Americana Salon 4, Second Level

5 p.m.
- 6:30
p.m.

Opening Plenary: Keeping the Stories Alive: The Role of Philanthropy in the Arts

There is a reason why some people believe a picture is worth a thousand words. Art, especially performance art, tells a story through powerful movement, sounds, and stirring choreography. See stories come to life during this inspirational and entertaining session and find out how integral philanthropic dollars are to keeping the arts alive. Experience the work of a videographer and watch performances from a flamenco dancer, an instrumental quartet, a chorus, and an actor.

Performers: Clarita Filgueiras, Seraphic Fire, Teo Castellanos D-Projects, and Dinorah de Jesús Rodríguez

Presenter(s): [Jane Gilbert](#), Community Affairs Officer, South Florida, Wells Fargo
Session Designer(s): [Gary Lund](#), Director, Anchor Arts Management, Inc.; [Adriana Perez](#), Cultural Projects Administrator, Miami-Dade County Department of Cultural Affairs

Meeting Room: Americana Salon 1-3, Second Level

7 p.m.
- 8:30
p.m.

Evening Event at the New World Symphony

Find out what others are doing to spice up their philanthropy when you network in one of Miami's cultural icons and undoubtedly its most "harmonious" setting: the New World Symphony, America's only full-time orchestral academy.

Designed by Pritzker Architecture Prize winner Frank Gehry, the academy is a laboratory for musical education and expression cultivating the skills of the most talented musicians.

Just blocks from the ocean and overlooking a public park, it's the perfect space to unwind, relax, and chat over colorful cocktails and tasty hors d'oeuvres featuring Miami's many unique flavors.

Meeting Room: OFF-SITE

Tuesday, February 14

7 a.m. -
5 p.m.

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Post-conference Orders – \$299

Order early and save!

Meeting Room: TBD

8:30
a.m. - 10
a.m.

Education Breakfast Plenary: Getting Our Kids Unstuck

There are a few powerhouse individuals who have said no to the status quo and are meeting today's many education-related challenges head-on. One of them is [Ron Clark](#)—the New York Times bestselling author of [Ending Molasses Classes: Getting our Kids Unstuck](#) and the founder of the [Ron Clark Academy](#). Hear how he is awakening the love of learning in today's students and offering real solutions to help parents, teachers, and communities do the same. You'll leave this plenary session with a sense of urgency and a full to-do list.

Presenter(s): [Ron Clark](#), Founder, The Ron Clark Academy
Session Designer(s): [Ron Clark](#), Founder, The Ron Clark Academy

Meeting Room: Americana Salon 1-3, Second Level

10 a.m. -
10:30
a.m.

Family Central Break

Meeting Room: Americana Salon 4, Second Level

10 a.m. -
12:30
p.m.

Off-site Learning Experience: Big Art in Little Haiti

Immerse yourself in all that is art and culture in Haiti by participating in this tour of the galleries and performance areas of the Little Haiti Cultural Center, the result of a unique public-philanthropic partnership. You'll also have the chance to participate in a hand-on art project of your own. Please pick up your tickets onsite early.

Session Designer(s): [Nancy Jones](#), Vice President, Public Affairs & Communications, The Miami Foundation

Meeting Room: OFF-SITE

10:15

Concurrent Sessions

a.m. -
12:15
p.m.

The Family Foundation CEO – What the Research Reveals

Sponsored by Glenmede

The National Center for Family Philanthropy recently concluded 18 months of research that revealed the generative and delicate nature of family foundation CEO leadership. This session will look at the results of this important research—and at the multifaceted roles of these individuals, who are simultaneously trying to juggle positions in the family and the community, maintain a proper work-life balance, and contemplate the future.

Presenter(s): [Virginia M. Esposito](#), President, National Center for Family Philanthropy
Session Designer(s): [Karen Green](#), Vice President, National Center for Family Philanthropy

Meeting Room: COWRIE 1, Third Level

10:30
a.m. - 12
p.m.

Concurrent Sessions

Building Community by Investing in Education

Access to a quality education is a cornerstone of a healthy community and an equitable society. What is the role of funders in improving educational opportunities and outcomes? How do education reform efforts fit into the larger educational system? How can parents, educators, and civic and business leaders be mobilized to improve the educational experience and outcomes for K–12 students? Please join this conversation designed to identify challenges, showcase successes, and deliver strategies to help you navigate education-related funding in your community.

Presenter(s): [Alberto M. Carvalho](#), Superintendent, Miami-Dade County Public Schools; [Ron Clark](#), Founder, The Ron Clark Academy; [Jeffrey Miller](#), Owner/President, 125 Management LLC; [Isaac Prilleltensky](#), Dean and Professor, University of Miami School of Education
Moderator(s): [Deborah Bussel](#), Principal, Bussel Philanthropy Associates
Session Designer(s): [Deborah Bussel](#), Principal, Bussel Philanthropy Associates

Meeting Room: COWRIE 2, Third Level

Engaging Youth and Building Community through Music and the Arts

While music and arts programs can engage youth and change communities in transformative ways, what are the keys to success? How can effective models be transported to other communities? What roles can donors play, and what are potential pitfalls? Explore how funders can support and scale such efforts for broader impact.

Presenter(s): [Jim Kearns](#), Board Member, Incredible Children's Art Network ; [Amy Schneider](#), Executive Director, Incredible Children's Art Network ; [Alysia Souder](#), Executive Director, The Institute of Music for Children
Moderator(s): [Leslie Pine](#), Senior Vice President for Program, The Philanthropic Initiative
Session Designer(s): [Leslie Pine](#), Senior Vice President for Program, The Philanthropic

Initiative

Meeting Room: POINCIANA 4, Second Level

Ethics and Legacy in Family Philanthropy

Utilizing a case study approach and themes highlighted in the Art of the Steal—a documentary about the Barnes Collection—experts in ethics and family philanthropy will discuss a variety of relevant topics. Come prepared to participate in a dialogue about how family philanthropists work through ethical issues and achieve greater heights.

Presenter(s): [Audrey Jacobs](#), Director, Center for Family Philanthropy, Community Foundation for Greater Atlanta; [Alan F. Rothschild Jr.](#), Partner, Hatcher, Stubbs, Land, Hollis & Rothschild; [Paul Wolpe](#), Asa Griggs Candler Professor of Bioethics, Emory Center for Ethics

Session Designer(s): [Audrey Jacobs](#), Director, Center for Family Philanthropy, Community Foundation for Greater Atlanta

Meeting Room: SANDS/NEW YORKER, Second Level

PRI's in the Ice Cream Shop: Lessons from Successes and Failures

Being involved in program related investments (PRIs) can be a little like being in an ice cream shop. A successful PRI might be the plain vanilla, while a failed PRI can be rocky road! Getting involved in PRIs can seem daunting and complex, but also can be a rewarding way to use some of the other 95 percent of your philanthropic assets. Learn about the lessons learned from risk-taking (or the lack thereof), clarity of mission and investing goals, and the benefits that arise from both successes and “instructive failures.”

Presenter(s): [Farhad Ebrahimi](#), Founder, Chorus Foundation; [Jenny D. Russell](#), Executive Director, Merck Family Fund

Moderator(s): [Craig Muska](#), Director of Investments, Foundation Services, Threshold Group

Session Designer(s): [Craig Muska](#), Director of Investments, Foundation Services, Threshold Group

Meeting Room: POINCIANA 3, Second Level

Same Cloth, Different Garments

While they may be cut from the same genetic cloth, family members frequently have different political viewpoints, lifestyles, and priorities. Learn why diversity on your family foundation board is a good thing and hear from families that are successfully balancing board diversity with philanthropic priorities.

Moderator(s): [Jason Born](#), Senior Program Director, National Center for Family Philanthropy; [Mary Phillips](#), President, GMA Foundations

Session Designer(s): [Jason Born](#), Senior Program Director, National Center for Family Philanthropy; [Mary Phillips](#), President, GMA Foundations

Meeting Room: POINCIANA 1, Second Level

Stop Avoiding It... How To Talk About Money

Many people believe money and sex are two of the most difficult subjects to talk about. This interactive session will look at the former in a way that's healthy and productive for families and family foundations by focusing on values, how we choose to give, and how we pass our legacy on to the next generations.

Sponsored by Jewish Communal Fund

Presenter(s): [Sharna Goldseker](#), Vice President, 21/64, The Andrea and Charles Bronfman Philanthropies, Inc. ; [Danielle Oristian York](#), Vice President, Pitcairn Financial Group

Session Designer(s): [Sharna Goldseker](#), Vice President, 21/64, The Andrea and Charles Bronfman Philanthropies, Inc. ; [Barbara Taylor](#), Program Associate, 21/64, The Andrea and Charles Bronfman Foundation, Inc.

Meeting Room: POINCIANA 2, Second Level

12 p.m. -
12:30
p.m.

Family Central Break

Meeting Room: Americana Salon 4, Second Level

12:30
p.m. - 2
p.m.

Tuesday Lunch Plenary: Capital for Impact: Broadening the Reach of Your Investments

Don't miss Greenblatt's remarks on philanthropy, business and government going beyond boundaries to work together. Get ready to think dynamically about driving impact through investment and partnership.

Presenter(s): [Jonathan Greenblatt](#), Director, White House Office of Social Innovation and Civic Participation

Session Designer(s): [Mary L. Galeti](#), Vice Chair, Tecovas Foundation; [Sharon Schneider](#), Philanthropic Advisor; [Laura Tomasko](#), Council on Foundations

Meeting Room: Americana Salon 1-3, Second Level

2 p.m. -
3 p.m.

Family Central Break

Meeting Room: Americana Salon 4, Second Level

2 p.m. -
4:30
p.m.

Off-site Education Learning Experience: United Way Center for Excellence in Early Education

The United Way Center for Excellence in Early Education is a learning, teaching, and

training initiative dedicated to elevating the quality of early care and education in the Miami-Dade area and beyond. Hear from President and CEO Harve Mogul and others about the center's three guiding principles—educate, demonstrate, and advocate—and then see them in action during a tour of this innovative facility.

Meeting Room: TBD

2 p.m. -
4:30
p.m.

Off-site Learning Experience: Creative Spaces Creative Places

Visit the Light Box at Goldman Warehouse in the Wynwood District to learn how several arts organizations have joined forces under one roof in a creative collaborative space designed to support artists—and their efforts to give back to the community. Tour the facility, speak with some of its inhabitants, and visit an outreach program of resident organization Arts for Learning. This off-site session is limited to 20 participants. Please pick up your tickets onsite early.

Session Designer(s): [Jane Gilbert](#), Community Affairs Officer, South Florida, Wells Fargo; [Sheila Womble](#), Executive Director, The Light Box at Goldman Warehouse

Meeting Room: OFF-SITE

3 p.m. -
4 p.m.

Concurrent Sessions

Break Down The Firewall: Impact Investing by Family Foundations

Sponsored by The American Committee for the Weizmann Institute of Science

Family foundations are uniquely positioned to pursue “impact investing.” But what exactly does that mean? And how do you overcome legitimate fears of diminished spending power? Hear from foundations that have succeeded and get the tools and advice you need to follow in their footsteps.

Presenter(s): [Daniel Echavarría](#), Chairman of the Board, Fundación Corona; [Kristin Hull](#), President and Board Chair, Hull Family Foundation; [Felipe Vergara](#), Cofounder and CEO, Lumni, Inc.

Moderator(s): [Berit Ashla](#), Philanthropic Director, Western Region, Foundation Source

Session Designer(s): [Berit Ashla](#), Philanthropic Director, Western Region, Foundation Source ; [Sharon Schneider](#), Philanthropic Advisor

Meeting Room: POINCIANA 1, Second Level

Cracking Inner-City Education: An Examination of Catholic Schools

Catholic schools have been educating students in poor and immigrant communities in the United States for more than 100 years, and studies have consistently shown that graduation rates are high. This session will look at a number of important questions: What is the formula for academic success at urban Catholic schools? How have these systems been able to consistently and successfully adapt to changing demographics? How can these lessons be applied to charter schools and to the broader public school

system? Why aren't Catholic schools part of the national dialogue on school reform?

Presenter(s): [Robert J. Birdsell](#), President and CEO, Christo Rey Network; [Steve Bumbaugh](#), Executive Director, Specialty Family Foundation; [Michael B. Reardon](#), Executive Director, Catholic Schools Foundation; [Mary Claire Ryan](#), Executive Director, NativityMiguel Network of Schools

Session Designer(s): [Steve Bumbaugh](#), Executive Director, Specialty Family Foundation

Meeting Room: SANDS/NEW YORKER, Second Level

Crafting an All-Weather Spending Policy for Family Foundations

Examine the role of spending policy and asset allocation in fulfilling a private foundation's mission and receive practical advice on meeting the challenges of today's difficult economic environment. What are the odds that your foundation's assets will keep pace with inflation? What is the optimal spending policy for your foundation's mission? Is a smoothing formula appropriate? We'll answer these questions—and many others—so that your foundation can achieve its philanthropic missions more effectively and with greater impact.

Presenter(s): [Richard Abramson](#), Senior National Managing Director, Bernstein Global Wealth Management

Session Designer(s): [Avi Sharon](#), Director of Marketing, Bernstein Global Wealth Management

Meeting Room: COWRIE 2, Third Level

Dominoes or Pick-Up Sticks: Philanthropy, Evaluation & Social Change

As philanthropy has expanded its conversations about evaluation, accountability, and social change, it is trickier than ever for funders to match the right tool to the right job. Learn about alternative approaches to evaluation that support complex social change strategies.

Presenter(s): [John Bare](#), Vice President, Sports Philanthropy and Affiliated Funds, The Arthur M. Blank Family Foundation

Session Designer(s): [John Bare](#), Vice President, Sports Philanthropy and Affiliated Funds, The Arthur M. Blank Family Foundation

Meeting Room: POINCIANA 2, Second Level

Small Assets Big Impact: Strategies to Leverage Small Sums

Achieving high impact involves being creative, taking risks, learning from successes and mistakes, and applying that learning over time. High impact is definitely within the reach of small foundations, especially those with a strong mission or program focus. Discover at least a dozen ways small foundations can achieve impact beyond their assets.

Presenter(s): [Andy Carroll](#), Senior Program Manager, Association of Small Foundations

Session Designer(s): [Andy Carroll](#), Senior Program Manager, Association of Small Foundations; [Hanh M. Le](#), Program Director, Association of Small Foundations

Meeting Room: COWRIE 1, Third Level

The Family Tree Rooted in History and Needing Room for Growth

How do we engage all generations in honoring history, legacy, and donor intent while incorporating the values and ideas of new generations to meet community needs? What processes and tools are available to help us cultivate a culture that embraces change, without uprooting the family tree? These questions—and more—will be answered during this session.

Presenter(s): [Charles E. Hart Jr.](#), Board Member, H Foundation; [Ariana Snowdon](#), Trustee, Hill-Snowdon Foundation; [Jane V. Soltis](#), Program Officer, Eckerd Family Foundation

Moderator(s): [Maggie Osborn](#), Vice President, Florida Philanthropic Network

Session Designer(s): [Maggie Osborn](#), Vice President, Florida Philanthropic Network

Meeting Room: POINCIANA 4, Second Level

Top Ten Ways Family Foundations Get Into Trouble

Serving on a family foundation board can be one of the most satisfying ways to give back to your community. But how do you know that you're doing everything you need to do—and, more important, doing it correctly? Avoid common mistakes by learning the top 10 ways family foundations get into trouble.

Presenter(s): [Janne Gallagher](#), Senior Vice President and General Counsel, Council on Foundations

Session Designer(s): [Janne Gallagher](#), Senior Vice President and General Counsel, Council on Foundations

Meeting Room: POINCIANA 3, Second Level

4 p.m. -
4:30
p.m.

Family Central Break

Meeting Room: Americana Salon 4, Second Level

4:30
p.m. -
6:30
p.m.

SITE SESSION: Art Deco Walk

Cost (due in cash at the beginning of the tour): \$25 per person

Miami Beach's renowned Art Deco District was listed on the National Register of Historic Places in 1979. Learn how Barbara Baer Capitman, who has been called the district's creator, won the fight to protect these 1930s treasures against deep-pocket developers with political ties. This walking tour includes many stops, so wear comfortable walking shoes, a hat, plenty of sunscreen—and don't forget the bottled water. Families with kids and strollers are welcome.

This tour is being organized and conducted by Alexandra Bassil, a local tour guide.

Session Designer(s): [Alexandra Bassil](#), Certified Heritage Tourism Guide

Meeting Room: OFF-SITE

6 p.m. -
8 p.m.

Family Reunion BBQ

A ticket is required for this event. The fee is \$25 for members and \$50 for nonmembers.

Sand, surf, and the sweet smell of authentic cooking—it's the perfect combination. Bring your family to the conference and enjoy two American favorites, the beach and a barbecue, at the Council's outdoor family reunion barbecue.

The evening will provide a relaxed opportunity to reminisce with those you know and to get acquainted with many new colleagues. Watch the sunset and sample some of the delicious Cuban and Haitian cuisine Miami is famous for.

Meeting Room: Americana Lawn

Wednesday, February 15

7 a.m. -
1 p.m.

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Meeting Room: TBD

7:30
a.m. - 9
a.m.

Breakfast Plenary: Revitalizing Our Work: Stewardship Principles, Family Philanthropy, and You!

Breakfast will be served in Americana 4

In 2004, the Council's Family Philanthropy Committee published Stewardship Principles for Family Foundations—the culmination of a field-wide effort to identify principles and practice options that strengthen philanthropic performance and help families achieve lasting and positive impact through their philanthropy. Now the committee needs your help once again to ensure the principles remain relevant as a helpful roadmap on effective practices in family giving and provide guidance to navigate new, critical challenges in a rapidly changing environment. As the first step in this process, we invite you to roll up your sleeves for a lively, interactive discussion with members of the committee and the Stewardship Principles Working Group. Your input will be included when the Council rereleases the Stewardship Principles later this year.

Stewardship Principles Working Group Members: **Reginald Jones**, president, Steans Family Foundation; **Victor DeLuca**, president, Jessie Smith Noyes Foundation; **Christine Elbel**, executive director, Fleishhacker Foundation; **Elenore Garton**, trustee, Marie C. and Joseph C. Wilson Foundation; **Michell Speight**, director of programs, Dyson Foundation; **Adam Gibbons**, trustee, Rasmuson Foundation; **Douglas B. Stewart**, executive director, Max M. and Marjorie S. Fisher Foundation

Session Designer(s): [Susan Beaudry](#), Interim Managing Director for Family Philanthropy, Council on Foundations; [Elizabeth B. Sullivan](#), Managing Director, Corporate and Independent, Council on Foundations

Meeting Room: Americana Salon 1-3, Second Level

9:30
a.m. -
11 a.m.

Concurrent Sessions A Next Gen Perspective on Bringing Community Voices Closer To the Board Room

Learning how to address the root causes of the problems we face is an integral part of social change philanthropy. How do we ensure that the priorities on the ground are influencing the priorities of philanthropy? How do we create genuine partnerships with our grantees? These questions and more will be discussed by Next Gen trustees and foundation staff.

Presenter(s): [Ariana Snowdon](#), Trustee, Hill-Snowdon Foundation
Session Designer(s): [Richard Graves](#), Family Philanthropy Organizer, Resource Generation

Meeting Room: POINCIANA 3, Second Level

Enhancing Family Philanthropy Through Global-Local Partnerships

While international philanthropy is increasing, many resources still aren't reaching the

local groups that know the most effective ways to implement change, even though partnering with these groups is the key to halting cycles of poverty, discrimination, and social injustice. Explore a variety of innovative methods for identifying effective local partners in some of the most remote corners of the world, building relationships, and ensuring long-term success.

Presenter(s): [C. Diane Christensen](#), President, The Christensen Fund; [Terry Odendahl](#), Executive Director and CEO, Global Greengrants Fund; [David Rosenmiller](#), Executive Director, Solidago Foundation; [Zhao Zhong](#), Cofounder and Board Member, Green Camel Bell

Session Designer(s): [Terry Odendahl](#), Executive Director and CEO, Global Greengrants Fund

Meeting Room: POINCIANA 2, Second Level

Location, Location, Location: Can Place-Based Funding Really Change Communities?

Place-based funding takes “geographic area of interest” to a whole new level and can yield powerful relationships between family members and community residents. Join the staff, trustees, and community residents of three family foundations that have embarked on this journey for a dynamic, two-part interactive workshop and discussion about the power and promise of “going small but going deep” to create lasting change in people’s lives and break cycles of despair and dependency.

Presenter(s): [Sharon Adams](#), Program Director, Walnut Way Conservation Corp.; [Kristine Breese](#), Director of Strategic Partnerships, Jacobs Family Foundation; [Danny Gutierrez](#), Project Safe Way Coordinator, Jacobs Center for Neighborhood Innovation; [Valerie Jacobs Hapke](#), Board Chair, Jacobs Family Foundation/Jacobs Center for Neighborhood Innovation; [Reginald Jones](#), President, Steans Family Foundation; [Susan Lloyd](#), Executive Director, Zilber Family Foundation, Inc.; [Terrell Minger](#), President and CEO, The Piton Foundation

Session Designer(s): [Kristine Breese](#), Director of Strategic Partnerships, Jacobs Family Foundation

Meeting Room: COWRIE 2, Third Level

Success Is Possible—How Will Your Foundation Pursue It?

All foundations want to make an impact, but getting there takes passion, intentionality, and patience. Formulate a clear and thoughtful plan for achieving your desired impact and leave with the tools and confidence to bring the framework and discussion back to your board.

Presenter(s): [Sara Beggs](#), Senior Program Manager, Association of Small Foundations; [Jean Buckley](#), President, Tracy Family Foundation

Session Designer(s): [Sara Beggs](#), Senior Program Manager, Association of Small Foundations; [Hanh M. Le](#), Program Director, Association of Small Foundations

Meeting Room: SANDS/NEW YORKER, Second Level

Supporting Educational Change: Strategies and Tools for Philanthropic Learning

This session will engage trustees, executives, staff, and individual philanthropists in small groups to discuss learning strategies related to governance, diversity,

community self-assessment, advocacy collaboration, and action research partnership.

Presenter(s): [Malwin Davila](#), Program Associate, William Caspar Graustein Memorial Fund; [Patti Faustini](#), Executive Assistant, William Caspar Graustein Memorial Fund; [William C. Graustein](#), Lead Trustee, William Caspar Graustein Memorial Fund; [Nancy B. Leonard](#), Public Policy Officer, William Caspar Graustein Memorial Fund; [David Martin](#), Policy Program Associate, William Caspar Graustein Memorial Fund; [David M. Nee](#), Executive Director, William Caspar Graustein Memorial Fund; [Carmen Siberon](#), Community Program Officer, William Caspar Graustein Memorial Fund

Moderator(s): [Angela Frusciante](#), Knowledge Development Officer, William Caspar Graustein Memorial Fund

Session Designer(s): [Angela Frusciante](#), Knowledge Development Officer, William Caspar Graustein Memorial Fund; [David M. Nee](#), Executive Director, William Caspar Graustein Memorial Fund

Meeting Room: POINCIANA 1, Second Level

Unexamined Privilege: The Impact of Class and Culture on Philanthropy

Explore the impact that class and culture has on your family, staff, and grantmaking. Learn from some common mistakes made by well-intentioned funders working with underserved and minority populations, and become more engaged, empowered, and effective.

Presenter(s): [Valerie Batts](#), Executive Director, VISIONS, Inc.; [John Capitman](#), Cofounder, VISIONS, Inc.

Moderator(s): [Meg Coward](#), Trustee, The Jersey Foundation; [Josephine Greene](#), Trustee, Josephine and Louise Crane Foundation

Session Designer(s): [Josephine Greene](#), Trustee, Josephine and Louise Crane Foundation

Meeting Room: POINCIANA 4, Second Level

Washington Update

With a presidential election on the horizon and Congress poised to review the tax code, 2012 is shaping up to be an exciting political year that will offer the philanthropic field an excellent opportunity to demonstrate its effectiveness and value to society. Join members of the Council's government relations team as they share the latest news from Washington, D.C., and offer tips on how to navigate the sometimes muddy political waters. You'll also hear how family foundations and regional associations from all over the country are partnering at the federal, state, and local levels to promote positive philanthropic policies.

Presenter(s): [Chatrane Birbal](#), Director, Government Relations, Council on Foundations; [Joanne V. Florino](#), Executive Director, Triad Foundation, Inc.; [Hal McCabe](#), Director of Field Operations, Council on Foundations; [Andrew Schulz](#), Vice President, Legal and Government Relations, Council on Foundations; [Elizabeth C. Wilder](#), Executive Director, Grantmakers Forum of New York

Session Designer(s): [Chatrane Birbal](#), Director, Government Relations, Council on Foundations; [Andrew Schulz](#), Vice President, Legal and Government Relations, Council on Foundations

Meeting Room: COWRIE 1, Third Level

11:30
a.m. - 1
p.m.

Lunch Plenary: The Changing Face of Family Philanthropy: A Conversation on How Cultures, Nationalities, and Communities Are Making a Difference

Join us for a conversation about diversity and how it influences the way we carry out our philanthropic giving. Family philanthropists including Alonzo and Tracy Mourning will share their successes and—equally as important—talk about the trials they have faced along the way. Fusion, the theme of the 2012 conference, will be part of the discussion as we explore how cultures, nationalities, and communities are quickly blending to change the face of family philanthropy.

Presenter(s): [Carmen Castellano](#), President, Castellano Family Foundation; [Ruth Cummings](#), Trustee, The Nathan Cummings Foundation; [Alonzo Mourning](#), Founder, Alonzo Mourning Charities; [Tracy Wilson Mourning](#), Founder, Honey Shine Mentoring Program; [Jaimie Mayer Phinney](#), Trustee, The Nathan Cummings Foundation
Moderator(s): [Reginald Jones](#), President, Steans Family Foundation
Session Designer(s): [Reginald Jones](#), President, Steans Family Foundation

Meeting Room: Americana Salon 1-3, Second Level

1:30
p.m. -
3:30
p.m.

SITE SESSION: Art Deco Walk

Cost (due in cash at the beginning of the tour): \$25 per person

Miami Beach's renowned Art Deco District was listed on the National Register of Historic Places in 1979. Learn how Barbara Baer Capitman, who has been called the district's creator, won the fight to protect these 1930s treasures against deep-pocket developers with political ties. This walking tour includes many stops, so wear comfortable walking shoes, a hat, plenty of sunscreen—and don't forget the bottled water. Families with kids and strollers are welcome.

This tour is being organized and conducted by Alexandra Bassil, a local tour guide.

Session Designer(s): [Alexandra Bassil](#), Certified Heritage Tourism Guide

Meeting Room: OFF-SITE